

DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT

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To: Energy Service Providers

Subject: EARS (Expenditure Activity Reporting System) Updates – New line items for REM/Design, TREAT Audits and TREAT Common Areas Measures.

Effective with the October Reporting Period CSD has modified the Expenditure Activity Reporting System (EARS) to include four (4) new reporting measures. The chart below reflects the new measures as they appear in the entry form for EARS.

Definitions:

Unit: A single-family dwelling or mobile home.

Building Unit: A dwelling unit that exists within a larger building encompassing two (2) or more units.

Building: A collection of building units encompassed by a single building envelope. A Building is not a countable unit in EARS Section 60 (Weatherized Dwellings by Type)

Section 160	Mandatory Assessments	# of Dwellings	Unit of Measure or Labor	Rate or Materials or Fees	Subcontractor	Other Labor
	REM/Design Energy Audit – Single Dwelling	# of Units	# of Audits	Materials Cost	Subcontractor Costs	Agency Labor
Section 162	Multifamily Building Energy	# of Dwellings	Unit of Measure or Labor	Rate or Materials or Fees	Subcontractor	Other Labor
	REM/Design Energy Audit – Multi Unit Building	# of Building Units within Audited Buildings	# of Buildings	Materials Cost	Subcontractor Costs	Agency Labor
	TREAT Energy Audit	# of Building Units within Audited Buildings	# of Buildings	Materials Cost	Auditing Firm Contract / Amt. Billed	Agency Labor
	TREAT – SIR Qualified Energy Audit Common Measures	N/A	N/A	Materials Cost	Subcontractor Costs	Agency Labor

REM/Design Energy Audit – Single Dwelling: Enter the number of Units, number of audits and the total cost of the audit(s) for Units reported in the appropriate columns.

REM/Design Energy Audit – Multi Unit Building: Enter the total number of Building Units within audited buildings, total number of Buildings audited and the total cost for REM/Design audit(s) performed during this reporting period.

TREAT Energy Audit: Enter the total number of Building Units, total number of Buildings and the total cost of audit(s) completed during this reporting period. Typically this will be the cost reflected in the bid(s) submitted by your qualified TREAT auditor.

TREAT – SIR Qualified Energy Audit Common Measures: This line-item accounts for total expenditures made for any common area items that have met the Savings-to-Investment Ratio (SIR) for the Building(s) being audited. Please Note: A detailed accounting of actual expenditures and measures will need to be submitted at a later date as future enhancements to the reporting systems occur.

Progress Billing – Common Measures *: An agency may report common area measures as they are installed and post-inspected, even though other common measures and the Building as a whole have not yet been completed. Please Note: The entire measure will need to be completed before billing can occur. For example, if there are thirty (30) light fixtures being installed as part of the common area improvements, all light fixtures will need to be installed and post-inspected before they can be billed.

Progress Billing – Individual Units *: Agencies may bill for individual Units that have been completed and post-inspected during one period (prior to the completion of the Building), and then bill for additional units as they are completed and post-inspected in subsequent periods.

*** Agencies wishing to utilize Progress Billing must request and execute a contract amendment in order to receive reimbursement on a progress billing basis.**

Important Note Regarding DOE ARRA: Caution should be taken when weatherizing multifamily buildings with ARRA funds under the “whole building” approach. All buildings and units being weatherized with ARRA funds must be completed and post inspected on or before March 31, 2012 in order to be eligible for reimbursement. Reimbursement for work conducted on partially completed buildings is not allowed and any progress payments received must be returned to CSD. Accordingly, progress payments should be considered provisional and may be subject to repayment.

If you have questions about the above, please contact Chuck Belk at (916) 576-7212 or cbelk@csd.ca.gov.